

Automated Case Directory – Reports Demo

IMAC IT Subcommittee Meeting

August 14, 2003

Over the last few weeks, DHFS and DWD staff have been meeting to define specific report criteria for the Automated Case Directory, ensuring that there is at least one report that answers each of the business questions that have been defined. We've defined a number of reports that we think will be quite useful, but in doing so we've made a few decisions based on our best assumptions of how you would like to have the reports function. Today we'll be showing you some of these reports and hope to get feedback that will help us finalize the first series of reports to be produced.

For each report, we've tried to determine the following things:

- (1) Grain, i.e., the level at which the report is run (e.g., Case, Case Individual, AG, AG Individual)
- (2) Which elements to build into the prompt.
- (3) Which level(s) of geography to use in the report.
- (4) Which elements to have appear in the report.
- (5) Which elements to have reports break on, which should result in page breaks, and which should appear on each page.
- (6) Which break elements should appear in the index (if any).
- (7) Which style of report to use (table, form, crosstab).
- (8) What sort orders should be used in the report.
- (9) What should appear in the title, header, footer.

Things to keep in mind when reviewing these reports:

- (1) Column widths will vary depending on the data within them.
- (2) Printing is reliant on browser print functionality.
- (3) Viewer-level users cannot alter title, sort order, or any other aspects of the report. (Interactive-level users can do this).
- (4) After running a prompted report, a user can save that specific report in their personal directory.
- (5) Users will have the capacity to export data in the report to an Excel spreadsheet

The following pages will show details and questions about the base reports that we will be showing you today. We plan to use these reports as the foundation of all other reports developed in the first release of the ACD application.

Prior to running the report query, prompts will appear that allow users to limit the report to specific County/Tribes, Offices or Worker IDs.

Questions:

- 1) Are there any additional data elements you want reports to be prompted on (e.g., Milwaukee Region)?

Indexes

Indexes (shown on the left) can be included to allow easier navigation through multi-page reports. Users can use their mouse to minimize the size of the index portion of the screen and allow more of the actual report to be visible.

The screenshot shows a web application interface titled "Document Results ACD -- Case Detail -- Table Format - Microsoft Internet Explorer". The address bar shows a URL with parameters like "ryType=M&RepositoryName=8&DocumentType=W&DocumentId=0&UserSubmit=8&Date=1060205429&ForceRefresh=8&Open=Y".

The interface has a sidebar on the left with a blue background and white text. The sidebar contains the following links:

- Welcome
- Corporate Documents
- Personal Documents
- Inbox Documents
- Create Documents
- Search
- Options
- Logout
- Help

The main content area is titled "Automated Case Directory -- Case Level Detail" and shows data as of 07/27/2003. It lists details for 13: Dane County, 5013: Dane Co HSD, and various administrative and supervisory units. The main table displays case details for Caseload 0643, including Case Number, Primary Person Name, Case Review Due Date, Case Mode Code, Case Status Code, CC Status, CTS Status, FS Status, and MA-LTC Status.

Caseload	Case Number	Primary Person Name	Case Review Due Date	Case Mode Code	Case Status Code	CC Status	CTS Status	FS Status	MA-LTC Status
0643	0000026417	David St. Hubbins	1993/08/31	0	00	Closed <30 Days	Active	Active	Closed <30 Days
	0102081689	David St. Hubbins	1993/08/31	0	00	Closed <30 Days	Active	Active	Closed <30 Days
	0103374302	David St. Hubbins	1993/08/31	0	00	Closed <30 Days	Active	Active	Active
	0106461508	David St. Hubbins	1993/08/31	0	00	Closed <30 Days	Active	Active	Active
	0108442105	David St.	1993/08/31	0	00	Closed <30	Active	Active	Active

Questions:

- 1) Do you want indexes to be available in the reports?

Report #1A – Case Level Detail Report (Table Format)

This report shows one row per case, with page breaks by worker, and cases grouped by caseload within the worker's listing. Drop-down boxes at the top of the report allow users to filter the query to any specific value for a given field on the report, e.g., if a user wants to see only cases where the FS Status = 'Active', they can select that value from a drop-down box at the top of the screen. Sums by caseload and worker appear at the bottom of each report.

Document Results - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print W Links

Address i.dwd.state.wi.us/wj/bin/iswi.dll/WIGenerator/wigenerator/generator/ExecuteWIS?sWIS=DefaultRFrame?entry=r6-s5&Open= Go Links

page 3 / 208 Download Drill Refresh Edit Save Publish Send Delete

Welcome Automated Case Directory -- Case Level Detail Last refresh: 8/7/2003 08:44:54 AM

Data as of 07/27/2003

40: Milwaukee County

5601: Milwaukee W2 Reg 1, YW Works

Administrative Unit: 0007

Supervisory Unit: 0026

Worker: XMI107 BASIL EXPOSITION

Caseload	Case Number	Primary Person Name	Case Review Due Date	Case Mode Code	Case Status Code	CC Status	CTS Status	FS Status	MA LTC Status	MA Premium Status	MA Limited Status	MA Family Status	MA EDB Status	Senior Care Status	W2 Status	Residence Address	P
Caseload: 8074	1104759616	David St. Hubbins	1993/08/31	0	00	Closed <30 Days	Active	Active	Active	Active	Active	Active	Active	Active	Closed <30 Days	3543 N 4TH ST MILWAUKEE WI 532121407	9
Count:	1																
Caseload: 9236	4115395842	David St. Hubbins	1993/08/31	0	C	Closed <30 Days	Active	Active	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	1220 W VLIET ST MILWAUKEE WI 532052117	9
	9113959093	David St. Hubbins	1993/08/31	0	C	Closed <30 Days	Active	Active	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	1220 W VLIET ST MILWAUKEE WI 532052117	9

Done Internet

Questions:

- 1) Is this how you would like to see this report broken down?
- 2) There is a data element that stores the specific Milwaukee Region Name and Number. Would you like this element as a prompt or a page break?
- 3) The worker displayed in this report is the Primary Worker. How would you like us to handle FEPs and Case Managers?
- 4) The possible values for each program are as follows: Currently Open, Open in Future, Closed <30 Days, Pending and Not Active. For these reports do you want these participation types grouped in some other way (e.g., Currently Open/Not Currently Open or Active/Not Active)?
- 5) Do you want the report sorted by Case Number, Primary Person Name, or some other way?

This report is very similar to the first report, but rather than showing one row per case, data elements are grouped into a “block” of data for each case. This allows for more data elements to be displayed per case, but fewer cases will appear on each screen or each page of a printed report.

Questions:

C:\IMAC\081403 Automated Case Directory.doc
09/15/03 12:33 PM

Report #2 – Office Caseload Summary

This report provides summary reports for each office. Unlike other reports, the prompt does *not* include Worker ID, as the intent is for this to be an office-level summary. There is one row in the report for each combination of activity in each program or subprogram group.

Document Results ACD -- Office Caseload Summary - Microsoft Internet Explorer

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Back Forward Stop Home Search Favorites Media Print W Links

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Welcome Data as of 07/27/2003 13 Office Name (All values) Case Status Code (All values) CC

Corporate Documents

Personal Documents

Inbox Documents

Create Documents

Search

Options

Logout

Help

Automated Case Directory -- Office Caseload Summary Last refresh: 8/1/2003 12:37:03 PM

Data as of 07/27/2003

13: Dane County

5013: Dane Co HSD

Cases	Case Status Code	CC Status	CTS Status	FS Status	MA-LTC Status	MA-Premium Status	MA-Limited Status	MA-Family Status	MA-EDB Status	Senior Care Status	W2 Status
1	C	Closed <30 Days	Active	Active	Active	Active	Active	Active	Active	Active	Closed <30 Days
34	C	Closed <30 Days	Active	Active	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days
17	OC	Closed <30 Days	Active	Active	Active	Active	Active	Active	Active	Active	Closed <30 Days
6	OC	Closed <30 Days	Active	Active	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days
778	OO	Closed <30 Days	Active	Active	Active	Active	Active	Active	Active	Active	Closed <30 Days
800	OO	Closed <30 Days	Active	Active	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days	Closed <30 Days
1,636											

5513: Dane Co W2 Program

Cases	Case Status Code	CC Status	CTS Status	FS Status	MA-LTC Status	MA-Premium Status	MA-Limited Status	MA-Family Status	MA-EDB Status	Senior Care Status	W2 Status
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Done Internet

Questions:

- (1) Should there be additional reports providing summaries at different levels?
- (2) The possible values for each program are as follows: Currently Open, Open in Future, Closed <30 Days, Pending and Not Active. For these reports do you want these participation types grouped in some other way?
- (3) Do you want to be able to “drill-down” to see the specific case numbers that make up each of the counts (this may be best done in a separate report)?

Report #3 – AG Detail Report

This report show one row per AG per case, with AG-specific information (eligibility dates, review dates).

Document Results ACD -- AG Detail - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print W

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« << page 4 / 149 >> » Download Drill Refresh Edit Save Publish Send Delete <

Welcome

Automated Case Directory -- AG Detail Report Last refresh: 7/30/2003 02:06:20 PM

13: Dane County
5013: Dane Co HSD
Supervisory Unit: 0082
Administrative Unit: 0025
Worker: XDA078 BASIL EXPOSITION

Caseload	Case Number	Program Code	AG Status Code	AG Eligibility Begin Date	AG Eligibility End Date	AG Review Due Date
Caseload: 0643	4113958548	CC	O	2003/06/01	2003/09/30	2003/08/31
		QMB	O	2003/06/01	2003/09/30	2003/08/31
Caseload	Case Number	Program Code	AG Status Code	AG Eligibility Begin Date	AG Eligibility End Date	AG Review Due Date
Caseload: 0643	5113044351	CC	T	2003/06/01	2003/09/30	2003/08/31
		WWW	T	2003/06/01	2003/09/30	2003/08/31

Page 4

Internet

Questions:

- 1) Do you want to see a report that contains AG information without any Individual information?
- 2) Are there any other AG-specific data elements you would like to see on this report?

Report #4 – AG Individual Detail

This report contains one row per individual per AG. This means that individual information will be duplicated for each AG in the case. This report has been the basis for many of the other data-specific reports we are creating.

Document Results ACD -- AG Indiv Detail - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print W Links

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page 2 / 158

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Welcome Automated Case Directory -- AG Individual Listing Last refresh: 8/13/2003 11:26:32 AM

13: Dane County
5013: Dane Co HSD
Supervisory Unit: 0082
Administrative Unit: 0025
Worker: XDA056 BASIL EXPOSITION
Caseload: 0643

Case Number	Program Code	AG Status Code	Primary Person / Not Primary Person	Participation Status Code	PIN	Name	SSN	DOB	Gender
0000026417	CC	O	Non-Primary Person	EA	0505631415	TUFNEL, John, .	999999999	05/Feb/60	Male
		O	Primary Person	EA	0505631407	TUFNEL, Shelly, .	999999999	31/Mar/65	Female
0102081699	CC	O	Non-Primary Person	EA	0503744816	TUFNEL, ROSE, A	999999999	16/Sep/37	Female
		O	Primary Person	EA	0503744808	TUFNEL, RICHARD, M	999999999	23/Jul/38	Male

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Questions:

- (1) What other AG-Individual-specific data elements would you like to see on this report?
- (2) Do you want the report sorted by Case Number, Primary Person Name, or some other way?

Report #6 – Case Individual Detail Report

This report shows individual information without AG information. The advantage is that each individual in a case only appears once per case listing; the drawback is that there is no information pertaining to the AGs the individuals are active in.

Document Results ACD -- Case Indiv Detail - Microsoft Internet Explorer

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Back Forward Stop Home Search Favorites Media Print W

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< << page 2 / 155 >> > Download Drill Refresh Edit Save Publish Send Delete <

Welcome Last refresh: 8/13/2003 11:30:41 AM

13: Dane County

Corporate Documents 5013: Dane Co HSD

Personal Documents Supervisory Unit: 0082

Administrative Unit: 0025

Worker: XDA056 BASIL EXPOSITION

Inbox Documents Caseload: 0643

Create Documents

Case Number	Primary Person / Not Primary Person	PIN	Name	SSN	DOB	Gender
0000026417	Non-Primary Person	0505631415	TUFNEL, John, .	999999999	05/Feb/60	Male
	Primary Person	0505631407	TUFNEL, Shelly, .	999999999	31/Mar/65	Female

Case Number	Primary Person / Not Primary Person	PIN	Name	SSN	DOB	Gender
0102081689	Non-Primary Person	0503744816	TUFNEL, ROSE, A	999999999	16/Sep/37	Female
	Primary Person	0503744808	TUFNEL, RICHARD, M	999999999	23/Jul/38	Male

Case Number	Primary Person / Not Primary Person	PIN	Name	SSN	DOB	Gender
0103374302	Primary Person	0511478216	TUFNEL, ELIZABETH, A	999999999	01/Aug/24	Female

Case Number	Primary Person / Not Primary Person	PIN	Name	SSN	DOB	Gender
0106461508	Primary Person	0517836912	TUFNEL, ROBYN, L	999999999	16/Oct/64	Female

Done Internet

Questions:

- (1) Is there likely to be a need for a case-individual listing?
- (2) Do you want the report sorted by Case Number, Primary Person Name, or some other way?